Status	Active	PolicyStat ID (15122029)
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Beaumont

Origination 11/6/2020 Last Approved 9/12/2024 Effective 9/12/2024 Last Revised 9/12/2024 Next Review 9/12/2026 Document Kimberly Cole: Contact Spec, Operations Area Laboratory Applicability Dearborn, Taylor, Trenton, Wayne

Laboratory Off Site Records Storage

Document Type: Procedure

I. PURPOSE AND OBJECTIVE:

The purpose of this document is to provide a procedure relating to the creation, maintenance, and destruction of laboratory paper records and documents.

II. DEFINITIONS:

- A. Documents: Documents provide a description of or instructions regarding what is supposed to happen and how to make it happen. Examples of documents blank forms and job aids.
- B. Records: Records provide evidence of what did happen. Examples of records include completed forms, patient test results, quality control results, results documented in the computer, and audit results.

III. PROCEDURE:

A. Record Creation

- 1. Records must be legible and indelible. All manual records are to be kept with black or blue ink pens. The only exception to this policy is that red ink may be used to perform supervisory review.
- 2. Records must be created concurrently for each critical task performed.
- 3. The actual test results of each test performed must be recorded immediately, either on a form designated for this purpose or in the computer. Test results must be recorded at the time the test is performed in order to reduce the risk of transcription errors from delayed recording.

B. Iron Mountain (IM) Retention of paper Records and Documents

1. Iron Mountain is a storage and information management company. Records may be sent off-site to Iron Mountain for retention. The records are retained at Iron Mountain for at

least the minimum retention period as per the <u>Record Management</u>, <u>Retention and</u> <u>Destruction</u> Policy and the <u>Laboratory Document Management and Record Retention</u> procedure. In order to send records off site you have to have access to iron mountain connect (IMC) online. Access is controlled and maintained by the Corewell Health Record Management and Print services Department. Please contact them to request access.

C. Accessing iron mountain connect (IMC)

- 1. Getting started
 - a. Enter a Service Now ticket for access.
- 2. Initial Sign On
 - a. Follow instructions provided upon approval.

D. Iron Mountain Labels

- 1. To begin the off-site records storage process you need to order Radio-Frequency Identification (RFID) bar-code labels from Iron Mountain. To do this:
- 2. Log on to iron mountain connect (IMC).
- 3. Go to Records Management.
- 4. Order Supplies, (lower-left under orange bar),
- 5. Select your customer number and department identification provided by self service chat.
- 6. Select address, (if not listed click add address and add your location),
- 7. Select your item(s).
- 8. Proceed to checkout.

E. Ordering Empty Boxes

 You may order boxes from Iron Mountain, if you do, you do NOT need to order labels as the boxes come with labels already affixed. However, it is preferred that you order plain boxes from preferred vendor office supply as they are less expensive, and then order just the labels from IM. Labels come 10 to a pack and can be affixed on the front of the Staples box.

F. Record Keeping

- 1. Keep an electronic or paper spreadsheet of the boxes and their contents that you send to IM so that you can retrieve them in the future.
 - a. From the RFID label, document the numbered portion of the RFID label and a description of the box contents for your records.

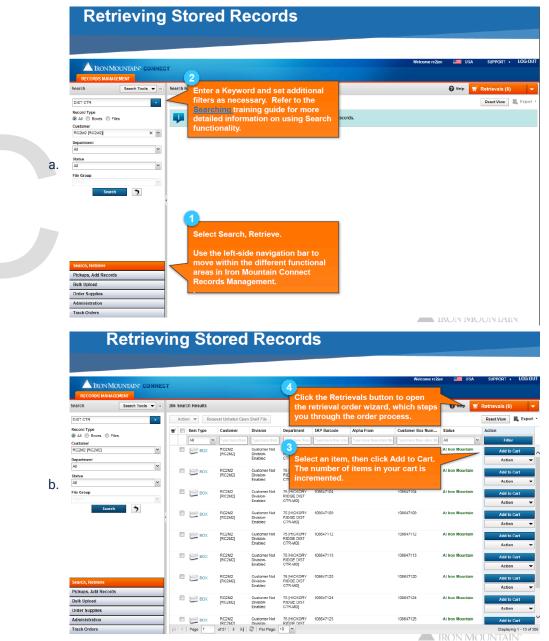
G. Entering new boxes on Iron Mountain Connect

- 1. Log on to Iron Mountain Connect.
- 2. Go to Records Management.
- 3. Pickup.
- 4. Add records.
- 5. Select Add box and follow the prompts for data entry.

- 6. Required input is noted with an Asterisk.
- 7. Repeat for each box then proceed to checkout.
- Retention Code: One of the most important items required is the retention code for each box entered into inventory. The retention code determines the length each box is required to remain in inventory and when each box is eligible for destruction. You MUST enter a retention code number for each box submitted (See "<u>Record Storage and Destruction</u> <u>Procedure</u>")

H. Retrieval of Records from Iron Mountain

- 1. Records may be retrieved from Iron Mountain as described below.
- 2. Use the RFID barcode label that was placed on the box as the keyword for searching. The RFID barcode label number usually begins with an R.

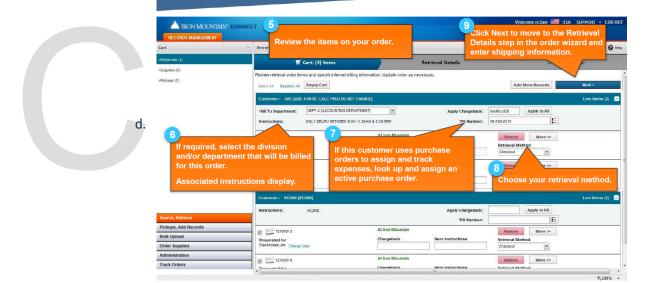


Retrieving Stored Records

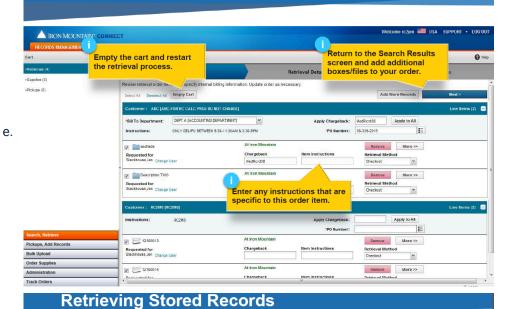
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Retrieving Stored Records



Retrieving Stored Records





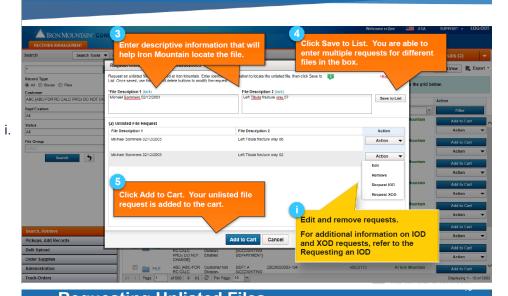
Retrieving Stored Records

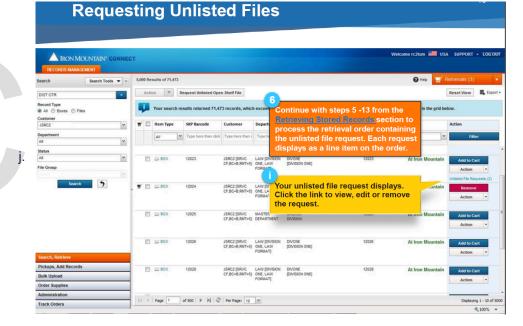
Requesting Unlisted Files

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Requesting Unlisted Files



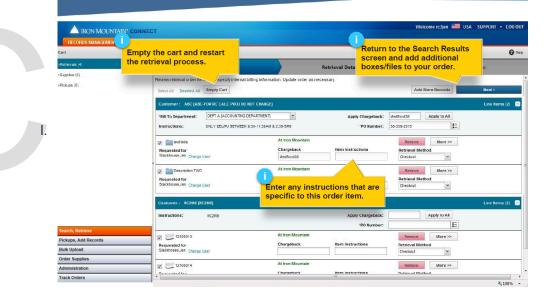


Requesting Unlisted Open Shelf Files

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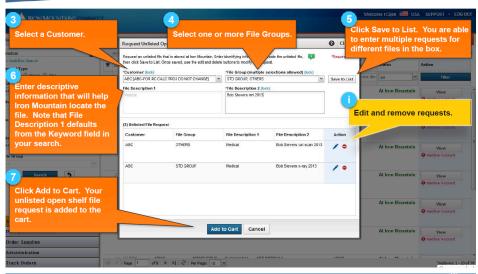
Retrieving Stored Records

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Requesting Unlisted Open Shelf Files

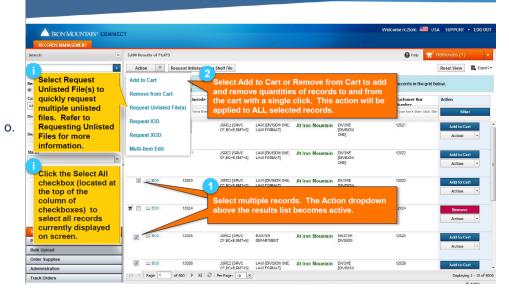
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Requesting Unlisted Open Shelf Files

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Adding and Removing Large Quantities (Bulk Actions)



I. Example of Search for Corewell Health or previously Beaumont laboratory AutoTechnical Record:

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Approval Signatures

Step Description	Approver	Date
Medical Director	Jeremy Powers: Chief, Pathology	9/12/2024
Medical Director	Muhammad Arshad: Chief, Pathology	9/5/2024

Policy and Forms Steering Committee Approval (if needed)	Kimberly Cole: Spec, Operations	9/5/2024
	Christopher Ferguson: Dir, Lab Services	9/4/2024
	Helga Groat: Supv, Laboratory	9/4/2024
	Katherine Persinger: Mgr, Laboratory	8/6/2024
	Kristen DiCicco: Mgr, Laboratory	8/2/2024
	Ashley Beesley: Mgr, Laboratory	8/1/2024
	Kimberly Cole: Spec, Operations	8/1/2024

Applicability

Dearborn, Taylor, Trenton, Wayne

